



PRACTICAL GUIDE

Quattrus





Hello! In this practical guide you will get an overview of **Quattrus**, going through each of these:

- Dashboard
- Metrics
- Charts
- Improvement Plans
- FCA
- Results Meetings

ENJOY THE READING!



HIERARCHICAL TREE: In this area you can expand and view the tree that shows the structure of your team.

Clicking on the button "QUATTRUS" you will always return to the home page.

GREEN
The result was expected. No need to worry about this KPI.

YELLOW
The result was worse than expected. The person responsible will need to identify the causes and remove them.

BLACK CIRCLE
It happens on yellow, blue and red colors in which the FCA analysis hasn't been performed. Can also occur with white, when something should have been measured but it didn't, needing a FCA..

ARROW ABOVE HEADLIGHT
It means a bar chart and/or Pareto chart was made on that month.

SCORE EGU:
Here you can track your score in real time.

SOFTWARE: Here you can see other Quattrus related software which your company has access to.

PENDING ACTIONS:
Here you can see all your pending actions or those delegated by other users to you.

Here you can see the name of the user and a few user functions such as Change password, settings, logout, etc ...

THREE BAR BUTTON: With this button you can open and close the sidebar menu.

In the black bar you will find the icons of the features that will be available in Quattrus.

KPI NAME Here is the name that has been defined for your KPI.

The **UNIT OF MEASUREMENT** defines how the objective (KPI) will be measured. Must be a unit of measurement perceived by the customer.

SUPPORTED
This arrow indicates a Consolidated or Linked KPI. That is, this item is consolidated by other KPIs or there are other KPIs linked to it.

PRIORITY:
Sets the KPI's level of importance and display order in the Dashboard.

CLIENT
Type of customer that is being used by this KPI: S (Shareholder), E (Environment), C (Client) or T (Team).

VERTICAL BLACK BAR: It means that the Range was changed.

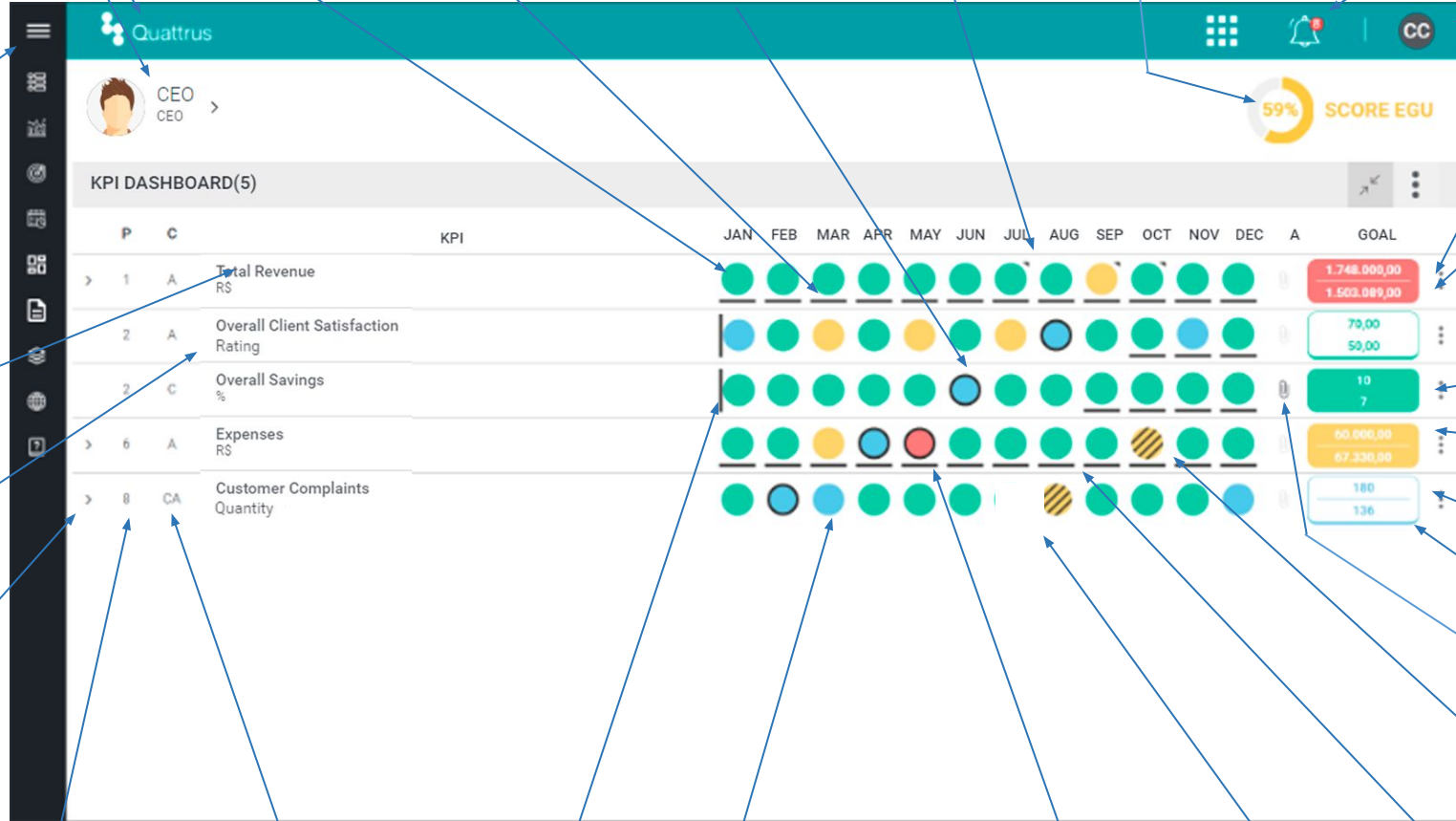
BLUE
It means that the result was better than normal (Good Yellow). The person in charge should identify the causes and fix them.

RED
An amount so abnormal that the manager should look into it.

NO CIRCLE
This item is not measured this month.

HORIZONTAL BLACK BAR
Indicates an Action Plan.

CROSSHATCHED
The analysis was done but the action is overdue. This can happen in the months when the headlight is yellow, blue, or red.



LINHA DIVIDINDO A META
This KPI has a cumulative goal. In this case, the value above is the goal and the value below is the current projection of the accomplished result.

RED GOAL
The process is not able to satisfy the customer needs and there is no Plan to satisfy the customer yet. These goals are defined with the manager.

GREEN GOAL
The process is able to satisfy the customer or is there a Plan that will lead to customer satisfaction.

YELLOW GOAL
Existe um Plano para melhorar, mas ainda é insuficiente para atender o cliente.

BLUE GOAL
The process, satisfies and surpasses the client's desire.

GOAL BACKGROUND COLOR
White = Goal NOT approved
In Color = Goal APPROVED.

ATTACHMENTS
There is a file attached to this KPI.

When you click on **DASHBOARD**, you will return to the main screen.

You can navigate between years by clicking on the arrows in the **PERIOD** field located on the top bar.

In the **KPI** field, you see the selected KPI and can switch to other KPIs in your dashboard. Simply click the down arrow and select the desired item.

Here you see the **GOOD WHEN** and the **GOAL** of the selected item.

IMPORTANT: By clicking on the Goal, Quattrus will open a screen with the details of the approval status of the Goal, and you can approve or disapprove it, if you have this permission enabled in your profile.

The first column indicates the **MONTH** and **YEAR** to be measured.

In the **MEASURED** column, you define which months should or should not be considered by Quattrus. By default, all months are configured as active.

In the **ACCOMPLISHED** column you will register the value of your KPI each month.

FORECAST: fill in the values that you consider normal, expected or predictable for your KPI each month, i.e. the Voice of the Process (VOP);

GOAL: fill in the values of your challenge or goal to be achieved each month. In other words, the Voice of the Customer (VOC).

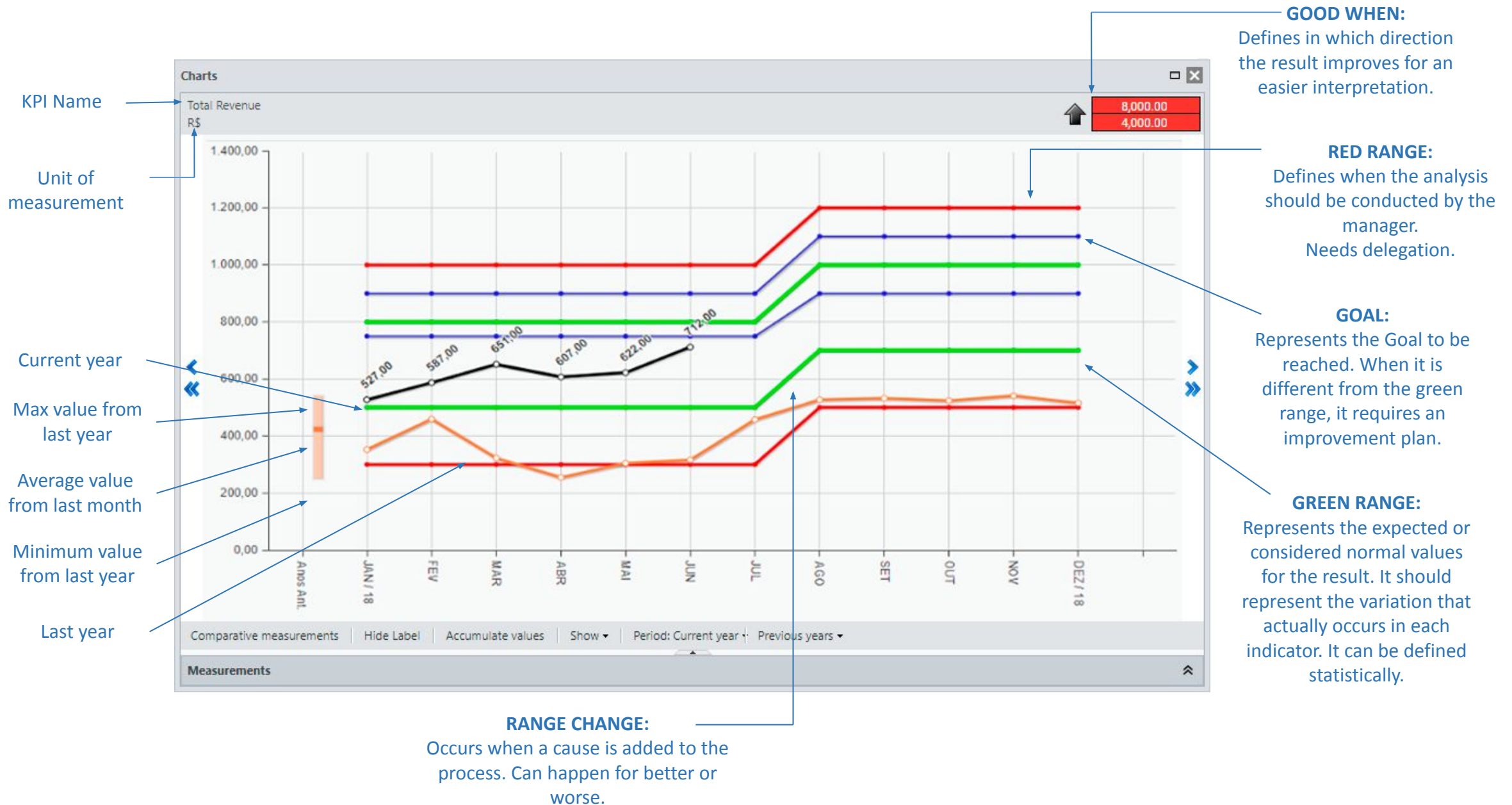
In the **COMMENT** column you can add observations, notes or comments that you consider useful each month

The **"LOCKED"** icon will appear if the KPI is being: consolidated by other KPIs, blocked by the protection calendar, or has an approved Goal. By clicking in one of the fields with the padlock the system will indicate the reason for being locked.

By clicking on the three-dot button, you will find the options **"EXPORT"** and **"AUTOFILL"**.

SAVE: After editing your data click Save.

PERIOD	KPI	GOAL			
< 2021 / 2022 >	Total Revenue RS	GOAL : JAN/22 1.748.000,00 1.503.089,00			
MONTH	MEASURED	ACCOMPLISHED	FORECAST	GOAL	COMMENT
Jan 21	<input checked="" type="checkbox"/>	121.663,00	123.500,00	149.000,00	
Feb 21	<input checked="" type="checkbox"/>	127.571,00	123.500,00	149.000,00	
Mar 21	<input checked="" type="checkbox"/>	125.077,00	123.500,00	149.000,00	
Apr 21	<input checked="" type="checkbox"/>	120.819,00	124.000,00	149.000,00	
May 21	<input checked="" type="checkbox"/>	128.023,00	128.000,00	149.000,00	
Jun 21	<input checked="" type="checkbox"/>	127.791,00	128.000,00	149.000,00	
Jul 21	<input checked="" type="checkbox"/>	123.556,00	128.000,00	149.000,00	
Aug 21	<input checked="" type="checkbox"/>	126.166,00	128.000,00	149.000,00	
Sep 21	<input checked="" type="checkbox"/>	105.131,00	123.000,00	139.000,00	
Oct 21	<input checked="" type="checkbox"/>	131.668,00	126.500,00	139.000,00	
Nov 21	<input checked="" type="checkbox"/>	129.132,00	129.500,00	139.000,00	
Dec 21	<input checked="" type="checkbox"/>	136.492,00	133.500,00	139.000,00	
Jan 22	<input checked="" type="checkbox"/>				



PRIORITY: Insert the priority.

NEW PLAN: Add a new Action Plan.

SAVE / CANCEL: Save or Cancel changes.

NEW ACTION: Add a new action to an already existing Action Plan.

Basic information about the Plan and its steps are displayed in Columns for easy viewing and monitoring.

KPI: KPI Name that the Plan refers to. You can click here and switch to other KPIs in your dashboard.

WHAT: Represents the action that will be performed. Use finite verbs that make it clear when what will be done (implant, Teach, ...).

WHY: Describe the result we want to achieve with this action or the importance of this action.

HOW / WHERE: Describe a tip, a contact, a reference to perform the action. A way to do it.

WHO: Name of the user responsible for carrying out the action.

From: Expected start date and **End Date:** expected end date.

COMPLETED: Select this option when the action is complete.

WHEN: insert when the action was completed.

VALUE: Insert how much it will cost to perform this action.

The screenshot shows the Quattrus interface for a KPI Dashboard. The main header is teal with the Quattrus logo and user profile 'QM'. Below the header is a navigation bar with buttons: 'New Plan', 'New Action', 'Edit', 'Delete', 'Efficacies', 'Hide', and 'Export'. The main content area is split into two views: 'List' and 'Gantt'. The 'List' view shows a table with columns: Pr., What, Action Owner, Initial date, and End Date. The 'Gantt' view shows a calendar from 2021 to 2022 with a yellow bar representing the action period from 31/01/22 to 28/02/22. A vertical dashed line indicates the 'Current Date'.

Pr.	What	Action Owner	Initial date	End Date
1	example	CEO	31/01/22	28/02/22

Start of the Plan

End of the Plan

Overdue Action

Action in progress

Completed Action

Current Date

It enables the change between KPIs and highlights in bold the ones that need analysis.

LINK KPI

☰ Total Revenue RS

ACCOMPLISHED 105,131.00

GREEN RANGE 110,700.00 to 135,300.00

9/2021

ATTACHMENT

GOAL 748.000

1.503.089

Result in this month

Range of expected values for the month.

It allows you to see the history of the months that the KPI was out of range.

Goal of the KPI in the month.

example

example

example

example

example

example

example

A action

31/01/22

VENCIDO

Focused on anomalies (what happened this month that didn't happen before). All we have measured are facts, not causes. The whole unfolding of Pareto falls here. We can use the question "Where?" or "In what?" This practice increases the depth of the analysis. It can be a portion of the KPI.

Search for the ROOT CAUSE, using the 5W method. This analysis requires knowledge of the technology and experience with the occurrences in the month; it is useful to use the support of another person.

Defines what will be done. It should modify a standard procedure or perform an action. Use finite verbs that make it clear when it will be completed (implement, acquire, ...). Action on cause, usually unhurried.

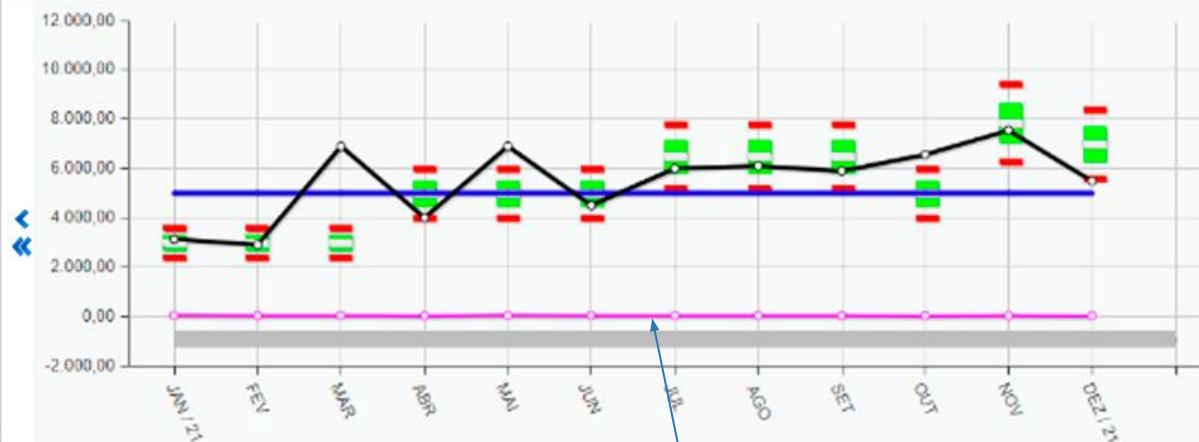
User responsible for the execution of the action.

Date by which the action will be completed. Set deadlines that you can meet. In this case, the action is overdue, and the date is red.

Action on EFFECT: removes the effect, but does not guarantee that the problem will stop happening for the same cause.

Action on CAUSE: removes the cause, preventing the problem from happening again for the same reason.

EVOLUTION CHART



PARETO CHART



The FCA integrated charts help by bringing more FACTS and DATA to the analysis.

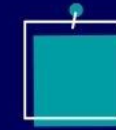
RESULTS MEETING (RM)

The results meeting is crucial for the functioning of the managers' KPIs. It is the main way to check the system, essential for the PDCA rotation.

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CRUCIAL CONDITIONS:



Scheduling meetings in advance (sticking to dates on the annual calendar);



Keep these dates;



Presence of the main authority concerned;



Establishing a rule that controls the gradual improvement of the meeting, making it evolve from a form of forcing people to search and analyze their data, until the routine takes no more than 10 minutes per manager. The rest of the time is used for negotiation and idea generation!

RESULTS MEETING (RM)

The KPI presentations are executed following a pattern, which evolves over time, as does the emphasis of the meeting. At the beginning, the main purposes of this presentation are:

Discuss business results, using the KPIs as a management method;

Encourage undecided people through the example of the leadership;

Expose and enhance everyone's managerial thinking;

Reinforce values such as "facts and data," customer focus, action on causes, Pareto reasoning;

Experience an exemplary, highly effective meeting;

Homogenize and clarify doubts about the methodology;

Make sure that everyone effectively keeps their KPIs up to date.

VITAL: *Assign a facilitator for the meeting, who promotes continuous improvement of the process and records the final evaluations and presents them at the beginning of the next meeting.*

● Practical Guide



RESULTS MEETING (RM)

FORMAT:

- Practical Guide



1° STEP: 10 MINUTES PER MANAGER

To explain the routine is enough!

- Showing my focus: selected KPIs;
- Explaining the future: based on the reality of the past;
- Introducing my way of reacting when goals are not met.

2° NEGOTIATION AND BRAINSTORMING

- Finish it!

